

**EPA**United States Environmental Protection Agency  
Washington, DC 20460**Work Assignment**

Work Assignment Number

3-30

☐

Other

☐

Amendment Number:

Contract Number

EP-W-13-002

Contract Period 11/19/2009 To 09/19/2014

Base

Option Period Number 3

Title of Work Assignment/SF Site Name

EPP Program Evaluation

Contractor

INDUSTRIAL ECONOMICS, INCORPORATED

Specify Section and paragraph of Contract SOW

Element III, Section 1, para(s) 1, page(s) 10-11

Purpose

☒

Work Assignment

☐

Work Assignment Close-Out

☐

Work Assignment Amendment

☐

Incremental Funding

☐

Work Plan Approval

Period of Performance

From 09/20/2012 To 04/30/2013

Comments:

The purpose of this action is to initiate Work Assignment (WA) 3-30, which continues but does not duplicate work previously performed under WA 2-30.

☐

Superfund

## Accounting and Appropriations Data

☒

Non-Superfund

SFO  
(Max 2)☐

Note: To report additional accounting and appropriations data use EPA Form 1900-69A.

Line	DCN (Max 6)	Budget/FY (Max 4)	Appropriation Code (Max 6)	Budget Org/Code (Max 7)	Program Element (Max 9)	Object Class (Max 4)	Amount (Dollars)	(Cents)	Site/Project (Max 8)	Cost Org/Code (Max 7)
1										
2										
3										
4										
5										

## Authorized Work Assignment Ceiling

Contract Period:

Cost/Fee:

LOE:

11/19/2009 to 09/19/2014

This Action:

Total

## Work Plan / Cost Estimate Approvals

Contractor WP Dated:

Cost/Fee:

LOE:

Cumulative Approved:

Cost/Fee:

LOE:

Work Assignment Manager Name Yvonne Watson

Branch/Mail Code:

Phone Number 202-566-2239

FAX Number:

(Signature)

(Date)

Project Officer Name Cheryl R. Brown

Branch/Mail Code:

Phone Number 202-566-0940

FAX Number:

(Signature)

(Date)

Other Agency Official Name

Branch/Mail Code:

Phone Number:

FAX Number:

(Signature)

(Date)

Contracting Official Name Stefan Martinyan

Branch/Mail Code:

Phone Number 202-564-1987

FAX Number:

(Signature)

(Date)

## **Work Assignment Statement of Work**

**Title:** Environmentally Preferable Purchasing (EPP) Program: Evaluating the Effectiveness of Promoting Green Purchasing by Federal Agencies

**Contractor:** IEc, Inc. **Contract No.:** EP-W-10-002

**Work Assignment Number:** 3-30

**Estimated Period of Performance:** September 20, 2012 to April 30, 2012

**Estimated Level of Effort:** 50.10 hours

**Key EPA Personnel:**

**Work Assignment COR (WA COR):**

Yvonne M. Watson  
OP/OSEM/ESD (MC1807T)  
202-566-2239  
202-566-2200

**Contract Level COR:** Cheryl R. Brown  
CMG/OP (1805T)  
202/566-0940  
202/566-3001 (fax)

### **BACKGROUND AND PURPOSE:**

Located within the Office of Policy (OP)'s Office of Strategic Environmental Management is the Evaluation Support Division (ESD). ESD's mission is to build the capacity of EPA staff and managers to conduct program evaluation activities throughout the Agency by providing technical support and training on program evaluation for EPA's national programs and regional offices. A crucial component in assessing the benefit of meeting goals, objectives, and sub-objectives is having measurable results.

As part of its effort to encourage the effective use of program evaluations throughout the Agency, ESD promotes program evaluation through a Program Evaluation Competition (PEC or Competition). This Competition is part of an ongoing, long-term effort to help build the capacity of headquarters and regional offices to evaluate activities and to improve measures of program performance. This program evaluation project was chosen for support under the current Program Evaluation Competition sponsored by OP.

Federal government procurement accounts for over \$500 billion annually. In addition, the government functions as a market leader, broadly affecting manufacturing (product planning and development), and purchasing (large institutions and States that mimic federal specifications). The impact of government purchases is also recognized as an important stimulus

to international green product initiatives mentioned in the U.N.'s "Green Economy" and OECD's "Green Growth" strategies. The EPP Program was established in 1993 by Executive Order 12873, *Federal Acquisition, Recycling and Waste Prevention*, and has been reaffirmed and expanded by subsequent Executive Orders. The program's objectives are to: (a) achieve dramatic reductions in the environmental footprint of federal purchasing through creation of guidelines, tools, recognition programs, environmental standards and other incentives and requirements, and (b) make the overall consumer marketplace more sustainable through federal leadership. It is a high-priority program in OPPT, involving several divisions, and is the largest single budget item in the Pollution Prevention Division's 2011 program allocation.

A 2001 study, *Qualitative Measurement of Environmentally Preferable Purchasing (EPP) Among Federal Employees in 2000*, provided an initial evaluation of EPP, and found only limited awareness of green purchasing options in federal procurement. OCSPP suspects there have been substantial improvements in overall awareness in the past decade as a result of maturing EPP programs, strengthened requirements, continued outreach, and the dissemination of standards, tools and guidance. The evaluation will assess the improvements that have occurred in the program since the 2001 study referenced above and identify and document the cost savings and reduced environmental footprint that can come from EPP purchases. The evaluation will use multiple, robust methodologies to gain evidence of effectiveness and produce results of strategic significance to OCSPP, EPA, and the federal government overall. The results will inform future management decisions about the program's direction, strategies, and funding levels, as well as the Agency's initiative on sustainable products and federal green purchasing approaches generally. This larger scale program evaluation is supported by the Office of Management and Budget's (OMB's) Evaluation Initiative.

#### **Quality Assurance (QA) Requirements**

Check ☐ Yes or ☒ **NO**, if the following statement is true or false. The Contractor shall submit a written Quality Assurance Project Plan for any project that is developing environmental measurements or a Quality Assurance Supplement to the Quality Management Plan for any project which generates environmental data using models with their technical proposal.

#### **TASKS AND DELIVERABLES:**

The work assignment (WA) Contracting Officer Representative (COR) will review all deliverables in draft form and provide revisions and/or comments to the contractor. The contractor shall prepare the final deliverables incorporating the WA COR's comments.

Contractor personnel shall at all times identify themselves as Contractor employees and shall not present themselves as EPA employees. Furthermore, they shall not represent the views of the U.S. Government, EPA, or its employees. In addition, the Contractor shall not engage in inherently governmental activities, including but not limited to actual determination of EPA policy and preparation of documents on EPA letterhead.

**The contractor shall not duplicate work performed in the previous work assignment.**

**Phase 1 Includes Task 1 and Tasks 2 (2-1 to 2-6).**

**TASK 1: PREPARE WORKPLAN – (COMPLETED)**

The contractor shall prepare a workplan that addresses Phase 1 and 2 within 15 calendar days of receipt of a work assignment signed by the Contracting Officer (CO). The workplan shall outline, describe and include the technical approach, resources, timeline and due dates for deliverables, a detailed cost estimate by task and a staffing plan. The WA COR and the Contract Level COR and the CO will review the workplan. However, only the CO can approve/disapprove the workplan. The contractor shall prepare a revised workplan incorporating the Contracting Officer's comments, if required.

**Deliverables and Schedule Under Task 1**

- |                      |   |
|----------------------|---|
| 1a. Workplan         | Within 15 calendar days of receipt of work assignment.                  |
| 1b. Revised workplan | Within 5 calendar days of receipt of comments from the CO, if required. |

**NOTE REGARDING WORK ASSIGNMENT DELIVERABLES AND TECHNICAL DIRECTION:**

The Work Assignment Contracting Officer's Representative (COR) is authorized to issue technical direction (TD) under this work assignment. The COR will follow-up all oral technical direction in writing within 5 days.

**TASK 2: DOCUMENT REVIEW AND DESIGN METHODOLOGY (INCOMPLETE)**  
*[Contract Scope of Work Element III, Section 1, para(s) 1, page(s) (10 -11)]*

- 2-1 PARTICIPATE IN CONFERENCE CALLS. **(INCOMPLETE)** The contractor shall participate in conference calls with the WA COR and other Agency staff to clarify the purpose of the evaluation effort and to exchange ideas about the design of the assessment, the information to be collected, potential sources of information, appropriate ways to analyze and present the information, and other pertinent matters. The COR will contact the contractor and provide a time and date for the conference calls.
- 2-2 REVIEW DOCUMENTS. **(COMPLETED)** The WA COR will provide the contractor with relevant links and essential documents to become familiar with the history, goals, and status of each program activity to be evaluated. In addition, the contractor shall conduct a literature review to determine if any existing evaluations, studies or analysis of the program have been conducted. The contractor is expected to seek out other documents for review, including those from government and non-government sources, to become familiar with all aspects of the program that are relevant to this evaluation effort. The contractor shall complete a review of these documents seven (7) calendar days after receiving them. The contractor shall also prepare and submit to the WA COR a bibliography and summary of the findings from the document and literature review. The contractor shall revise and update the bibliography periodically as additional literature sources are identified and reviewed.



- 2-3 **SCOPING TASK. (COMPLETED)** The contractor shall conduct a scoping exercise to better understand and identify the data sources (qualitative and/or quantitative) and data collection methods (surveys, in-person interviews, site visits, data base review or literature review, Internet search, review of progress reports etc.,) that are most appropriate for this evaluation. The contractor shall prepare a brief memo summarizing the results of this effort. The contractor shall deliver the scoping document 7 calendar days after receiving a TD from the WA COR.
- 2-4 **ASSIST IN DEVELOPING A LOGIC MODEL. (COMPLETED)** The development of a logic model is an essential tool in developing a common understanding of a program's inputs, outputs and activities. As an initial step in preparation for the evaluation, EPA began developing a logic model of its program. EPA will share the draft logic model with the contractor. Based on information gathered from the conference calls (Task 2-1) and document review (Task 2-2), the contractor will develop and submit a draft logic model using software (e.g., Microsoft Word, Power Point) that can be manipulated/revised by EPA within 7 calendar days after receipt of the draft logic model from the WA COR. The development of the logic model is an iterative process. The contractor shall finalize the logic model within 7 calendar days after receipt of comments on draft(s) of the logic model from the WA COR.
- 2-5 **REFINE EVALUATION QUESTIONS. (COMPLETED)** EPA is providing an initial list of draft evaluation questions for use by the contractor (see below). The EPA evaluation team has identified the following key questions to provide focus to the program evaluation. These questions, while subject to further refinement, will form the basis of the evaluation going forward. The overarching questions would likely remain consistent, but the specific questions and sub-questions would be subject to revision. Using this list, the information gathered in Tasks 2-1 and 2-2, and the logic model developed in Task 2-4, the contractor shall confer with the WA COR and evaluation team members to discuss and refine the evaluation questions that will be the subject of this evaluation. The contractor shall prepare and submit to the WA COR a revised, comprehensive set of draft evaluations and sub-questions that will be the subject of this evaluation. The contractor shall finalize the draft questions 7 calendar days after receipt of comments from the WA COR via Technical Direction (TD).

**Questions to be Addressed:**

- (1) What changes have occurred at federal agencies since the 2001 evaluation -- in terms of agency awareness, criteria and decision tools -- in implementing environmentally preferable purchasing as a result of our EPP Program? What have been the quantitative impacts of these changes in terms of types of products purchased?
- (2) How much has EPP contributed to the Agency's Strategic Plan goals for cost savings as well as reductions in hazardous materials, greenhouse emissions and water use?
- (3) To what extent has our EPP Program been effective at promoting the design, manufacture and use of environmentally preferable products for federal purchasing? What has been the trend in recent years for the percentage of products in conformance with standards, such as IEEE green electronic products and green carpet standards, which the EPP Program has spearheaded the development of?

- (4) How effective have EPP tools (i.e., the EPP database, the Federal Green Construction Guide, and various calculator tools) been to assist federal purchasers in buying green? To what extent does the literature indicate that EPP tools have impacted purchasing decisions outside the federal government?
- (5) What changes may be needed to address current EPP problems and issues, such as an apparent decline in energy savings as reported by federal agencies participating in the *Federal Electronics Challenge* -- a key EPP priority area?

2-6 **DESIGN EVALUATION METHODOLOGY. (COMPLETED)** Based on the conference calls (2-1), the document review (Task 2-2), the scoping document (Task 2-3), the final logic model (Task 2-4), and the final evaluation questions (Task 2-5), the contractor shall prepare a draft evaluation methodology, which will address the purpose, audience, the refined questions that will be the focus of the evaluation. As part of the methodology, the contractor shall document the primary and secondary data sources, collection methods, and collection strategy, appropriate qualitative and quantitative tools for analyzing data, practical issues of data collection, and a clear strategy for data documentation and management needed to answer each evaluation question. The contractor shall also document any survey instruments, survey data, survey questions, and interview/ discussion guides and protocols used in support of the evaluation. This methodology shall include an approach for identifying potential interviewees. The draft evaluation methodology shall also include a proposed schedule for each of the following: (1) all information gathering under Task 3-1, including interviews; (2) the compilation, analysis and presentation of information gathered (Task 3-2) and (3) providing a report outline and the draft and final reports (Task 4-1, 4-2 and 4-3). The draft evaluation methodology shall be due 21 calendar days after the receipt of a TD from the WA COR. The final evaluation methodology will be due 7 calendar days after receipt of comments from the WA COR via TD.

2-7 **EVALUATION ASSURANCE PLAN. (COMPLETED)** The contractor shall prepare an evaluation assurance plan (EAP) that shall describe the use of primary and or secondary data sources for the evaluation report. Specifically, the EAP will describe: 1) the purpose of the evaluation, 2) the methodology used to collect data for the report, 3) how and where data for the evaluation was collected, 4) why the particular data collection method was chosen, 5) how the data will be used and by whom, 6) how the resulting evaluation report will be used and by whom and, 7) any data limitations or caveats. An example of an EAP will be provided by the COR. The contractor shall submit the EAP to the WA COR one week after the final evaluation methodology is approved. A final EAP will be delivered 3 calendar days after receipt of comments from the WA COR via TD.

## **Deliverables and Schedule Under Task 2**

2-1	Participate in conference	To be specified by the WA COR
2-2	Summary of Document Review	7 calendar days after receipt of documents
2-3	Scoping Memo	7 calendar days after receipt of TD from WA COR
2-4	Finalize Logic Model	7 calendar days after receipt of draft Logic

2-5a	Draft Refined Questions	Model from WA COR 7 calendar days after final meeting with WA COR
2-5b	Final Refined Questions	7 calendar days after receipt of comments from WA COR via TD
2-6a	Draft evaluation methodology	21 calendar days after receipt of TD from WA COR
2-6b	Final evaluation methodology	7 calendar days after receipt of comments via TD from WA COR
2-7a	Evaluation Assurance Plan	7 calendar days after COR approves final evaluation methodology
2-7b	Evaluation Assurance Plan	3 calendar days after receipt of comments via TD from WA COR

**Phase 2 Includes Tasks 2 (2-7), 3 and 4**

**TASK 3: INFORMATION GATHERING AND ANALYSIS (INCOMPLETE)**  
*[Contract Scope of Work Element III, Section 1, para(s) 1, page(s) (10 -11)]*

- 3-1 INFORMATION GATHERING. **(INCOMPLETE)** The information that is needed to conduct this evaluation will come from a variety of sources including the information identified collected in Task 2-3 and included in the final methodology 2-6b. Within 7 calendar days after the WA COR approves the evaluation methodology (via TD), the contractor shall begin the data collection process specified in the approved evaluation methodology. The data collection will end in accordance with the schedule included in the evaluation methodology.
- 3-2 DISCUSSION OF DATA COMPILATION, ANALYSIS, AND PRESENTATION. **(INCOMPLETE)** In accordance with the evaluation methodology schedule, the contractor shall meet via conference call with the WA COR and other Agency staff to present and discuss approaches to and preliminary results of data compilation, analysis, and presentation of the information. Prior to this call and for discussion during the call, the contractor shall provide the WA COR with a briefing memo that outlines preliminary findings for each evaluation question, overall preliminary recommendations/conclusions.

**Deliverables and Schedule Under Task 3**

3-2a	Discuss data compilation, analysis and presentation	In accordance with Methodology Schedule approved in Task 2-5b
3-2b	Briefing memo of preliminary findings	In accordance with Methodology Schedule approved in Task 2-5b

**TASK 4: REPORTS (INCOMPLETE)**  
*[Contract Scope of Work Element III, Section 1, para(s) 1, page(s) (10 -11)]*

- 4-1 REPORT OUTLINE. **(INCOMPLETE)** The contractor shall submit an annotated outline describing the contents of the draft and final report. This will serve as a roadmap for laying out the format of the report. This will be instrumental in organizing the format and

flow of the document.

- 4-2 **DRAFT REPORT. (INCOMPLETE)** In accordance with the evaluation methodology schedule, the contractor shall submit a draft report containing, the compilation, analysis, and presentation of information developed and gathered during the conduct of the evaluation. Specifically, the contractor shall include information obtained or developed in support of Tasks 2-1 through 3-2. For purposes of costing, the contractor shall assume that a sequence of a draft preliminary findings memorandum and two separate draft reports will be required.
- 4-3 **FINAL REPORT. (INCOMPLETE)** The contractor shall provide a final report that reflects appropriate consideration of the Agency's comments on the draft report and of any comments received during the oral presentations. The WA COR will provide the contractor with a copy of the ESD's Report Style Guidelines. These guidelines shall be used to write all components of the evaluation report. In addition, the contractor shall use the ESD Report Cover provided by the WA COR when preparing the final report.
- 4-4 **EVALUATION RECOMMENDATION TAXONOMY FORM. (INCOMPLETE)** The EPA will use this form to categorize each recommendation the contractor develops for the final report. The contractor shall complete the Evaluation Recommendation Taxonomy Form by providing each recommendation for the given evaluation, its proposed evaluation recommendation category, its direct environmental impact, and any additional comments the contractor may have. The list of the evaluation recommendation categories is located on the form for reference purposes. The WA COR will provide the contractor with a copy of the Evaluation Recommendation Taxonomy Form. The contractor shall complete the taxonomy form 3 calendar days after the final report is completed.
- 4-5 **ORAL PRESENTATIONS. (INCOMPLETE)** The contractor shall be prepared to make at least one oral presentation of the information at a date, time, and location to be specified by the WA COR in a TD. The location will most likely be Washington, D.C. The contractor shall prepare appropriate briefing materials, specifically, a power point briefing for the oral presentation.
- 4-6 **FACTSHEET. (INCOMPLETE)** The contractor shall develop a fact sheet summarizing the evaluation purpose, questions, methodology, results and recommendations. The WA COR will provide the contractor with a copy of a fact sheet template 7 calendar days after completion of the Final Report.

#### **Deliverables and Schedule Under Task 4**

- |     |                |  |
|-----|----------------|--|
| 4-1 | Report Outline | In accordance with the evaluation methodology schedule approved by the COR in task 2-5b. |
| 4-2 | Draft report   | In accordance with the evaluation methodology schedule approved by the                   |

COR in task 2-5b.

4-3	Final report	14 calendar days after receipt of comments on the draft report and oral presentations.
4-4	Evaluation Recommendation Taxonomy	3 calendar days after the final report is completed.
4-5	Oral presentation	To be scheduled by the WA COR
4-6	Fact Sheet	7 calendar days after completion of Final Report

Table 1: Summary of Deliverables and Dates		
Task	Deliverable	Due Date
<b>Task 1 Prepare Work plan</b>		
1a	Work plan	Within 15 calendar days of receipt of work assignment
1b	Revised work plan	Within 5 calendar days of receipt of comments from CO
<b>Task 2 Document Review and Design Methodology</b>		
2-1	Participate in conference calls	To be specified by the WA COR
2-2	Review of Documents/Bibliography, summary of findings	7 calendar days after receipt of documents
2-3	Scoping Memo	7 calendar days after receipt of TD
2-4	Finalize Logic Model	7 calendar days after receipt of draft Logic Model from WA COR
2-5a	Draft Refined Questions	7 calendar days after receipt of TD from WA COR
2-5b	Final Refined Questions	7 calendar days after receipt of comments from WA COR via TD
2-6a	Draft Methodology	21 calendar days after receipt of TD from WA COR
2-6b	Final Methodology	7 calendar days after receipt of comments from WA COR
2-7a	Draft Evaluation Assurance Plan	7 calendar days after WA COR approves final evaluation methodology
2-7b	Final Evaluation Assurance Plan	3 days after receipt of comments from WA COR via TD
<b>Task 3 Information Gathering and Analysis</b>		
3-2	Discussion of Data Compilation, Analysis and Presentation Plan	In accordance with Methodology Schedule approved in Task 2-5b
<b>Task 4 Report</b>		
4-1	Report Outline	In accordance with Methodology Schedule approved in Task 2-5b
4-2	Draft Report	In accordance with Methodology Schedule approved in Task 2-5b
4-3	Final Report	14 calendar days after receipt of comments on Draft Report from WA COR
4-4	Evaluation Recommendation Taxonomy Form	3 calendar days after completion of the Final Report
4-5	Oral Presentations	To be scheduled by the WA COR
4-6	Fact Sheet	7 calendar days after completion of Final Report

<b>EPA</b> United States Environmental Protection Agency Washington, DC 20460 <b>Work Assignment</b>		Work Assignment Number 3 30	
		<input type="checkbox"/> Other <input checked="" type="checkbox"/> Amendment Number: 000001	
Contract Number EP-W-10-002	Contract Period 11/19/2009 To 09/19/2014 Base                      Option Period Number 3	Title of Work Assignment/SF Site Name EPP Program Evaluation	
Contractor INDUSTRIAL ECONOMICS, INCORPORATED		Specify Section and paragraph of Contract SOW Element III, Section 1, para(s) 1, page(s) 10-11	
Purpose: <input type="checkbox"/> Work Assignment <input type="checkbox"/> Work Assignment Close-Out <input checked="" type="checkbox"/> Work Assignment Amendment <input type="checkbox"/> Incremental Funding <input type="checkbox"/> Work Plan Approval		Period of Performance From 09/20/2012 To 04/30/2013	
Comments: The purpose of this amendment is to revise the Work Assignment Statement of Work and to increase the level of effort by 420 hours. The contractor shall submit a revised work plan and budget in accordance with the contract.			
<input type="checkbox"/> Superfund		Accounting and Appropriations Data	
		<input checked="" type="checkbox"/> Non-Superfund	
SFO (Max 2) <input type="checkbox"/>		Note: To report additional accounting and appropriations data use EPA Form 1900-63A.	
Line	ICCN (Max 6)	Budget/FY (Max 4)	Appropriation Code (Max 5)
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1			
2			
3			
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Authorized Work Assignment Ceiling			
Contract Period: 11/19/2009 To 09/19/2014		Cost/Fee: LOE	
This Action:			
Total:			
Work Plan / Cost Estimate Approvals			
Contractor WP Dated:		Cost/Fee: LOE	
Cumulative Approved:		Cost/Fee: LOE	
Work Assignment Manager Name Yvonne Watson _____ (Signature)                      (Date)		Branch/Mail Code: Phone Number 202-566-2239 FAX Number:	
Project Officer Name Cheryl R. Brown _____ (Signature)                      (Date)		Branch/Mail Code: Phone Number 202-566-0940 FAX Number:	
Other Agency Official Name _____ (Signature)                      (Date)		Branch/Mail Code: Phone Number: FAX Number:	
Contracting Official Name Stefan Martijan _____ (Signature)                      10/3/12 (Date)		Branch/Mail Code: Phone Number 202-564-1987 FAX Number:	

## **Work Assignment Statement of Work - AMENDED**

**Title:** Environmentally Preferable Purchasing (EPP) Program: Evaluating the Effectiveness of Promoting Green Purchasing by Federal Agencies

**Contractor:** IEc, Inc. **Contract No.:** EP-W-10-002

**Work Assignment Number:** 3-30

**Estimated Period of Performance:** September 20, 2012 to April 30, 2013

**Amended Level of Effort:** 420 hours

### **Key EPA Personnel:**

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Yvonne M. Watson  
OP/OSEM/ESD (MC1807T)  
202-566-2239  
202-566-2200

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#### **AMENDMENT PURPOSE**

The purpose of this amendment is to provide additional resources that will enable the contractor to: 1) conduct additional interviews; 2) perform a mini-market analysis that focuses on products that were certified to environmentally preferable standards; 3) purchase a commercial list of

federal procurement staff; 4) distribute, manage, and analysis survey day and respond to survey inquiries; and 5) develop a second draft of the evaluation report.

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- 2-2 REVIEW DOCUMENTS. **(COMPLETED)** The WA COR will provide the contractor with relevant links and essential documents to become familiar with the history, goals, and status of each program activity to be evaluated. In addition, the contractor shall conduct a literature review to determine if any existing evaluations, studies or analysis of the program have been conducted. The contractor is expected to seek out other documents for review, including those from government and non-government sources, to become familiar with all aspects of the program that are relevant to this evaluation effort. The contractor shall complete a review of these documents seven (7) calendar days after

receiving them. The contractor shall also prepare and submit to the WA COR a bibliography and summary of the findings from the document and literature review. The contractor shall revise and update the bibliography periodically as additional literature sources are identified and reviewed.

- 2-3 **SCOPING TASK. (COMPLETED)** The contractor shall conduct a scoping exercise to better understand and identify the data sources (qualitative and/or quantitative) and data collection methods (surveys, in-person interviews, site visits, data base review or literature review, Internet search, review of progress reports etc.,) that are most appropriate for this evaluation. The contractor shall prepare a brief memo summarizing the results of this effort. The contractor shall deliver the scoping document 7 calendar days after receiving a TD from the WA COR.
- 2-4 **ASSIST IN DEVELOPING A LOGIC MODEL. (COMPLETED)** The development of a logic model is an essential tool in developing a common understanding of a program's inputs, outputs and activities. As an initial step in preparation for the evaluation, EPA began developing a logic model of its program. EPA will share the draft logic model with the contractor. Based on information gathered from the conference calls (Task 2-1) and document review (Task 2-2), the contractor will develop and submit a draft logic model using software (e.g., Microsoft Word, Power Point) that can be manipulated/revised by EPA within 7 calendar days after receipt of the draft logic model from the WA COR. The development of the logic model is an iterative process. The contractor shall finalize the logic model within 7 calendar days after receipt of comments on draft(s) of the logic model from the WA COR.
- 2-5 **REFINE EVALUATION QUESTIONS. (COMPLETED)** EPA is providing an initial list of draft evaluation questions for use by the contractor (see below). The EPA evaluation team has identified the following key questions to provide focus to the program evaluation. These questions, while subject to further refinement, will form the basis of the evaluation going forward. The overarching questions would likely remain consistent, but the specific questions and sub-questions would be subject to revision. Using this list, the information gathered in Tasks 2-1 and 2-2, and the logic model developed in Task 2-4, the contractor shall confer with the WA COR and evaluation team members to discuss and refine the evaluation questions that will be the subject of this evaluation. The contractor shall prepare and submit to the WA COR a revised, comprehensive set of draft evaluations and sub-questions that will be the subject of this evaluation. The contractor shall finalize the draft questions 7 calendar days after receipt of comments from the WA COR via Technical Direction (TD).

#### **Questions to be Addressed:**

- (1) What changes have occurred at federal agencies since the 2001 evaluation -- in terms of agency awareness, criteria and decision tools -- in implementing environmentally preferable purchasing as a result of our EPP Program? What have been the quantitative impacts of these changes in terms of types of products purchased?
- (2) How much has EPP contributed to the Agency's Strategic Plan goals for cost savings as well as reductions in hazardous materials, greenhouse emissions and water use?

- (3) To what extent has our EPP Program been effective at promoting the design, manufacture and use of environmentally preferable products for federal purchasing? What has been the trend in recent years for the percentage of products in conformance with standards, such as IEEE green electronic products and green carpet standards, which the EPP Program has spearheaded the development of?
- (4) How effective have EPP tools (i.e., the EPP database, the Federal Green Construction Guide, and various calculator tools) been to assist federal purchasers in buying green? To what extent does the literature indicate that EPP tools have impacted purchasing decisions outside the federal government?
- (5) What changes may be needed to address current EPP problems and issues, such as an apparent decline in energy savings as reported by federal agencies participating in the *Federal Electronics Challenge* -- a key EPP priority area?

2-6 **DESIGN EVALUATION METHODOLOGY. (COMPLETED)** Based on the conference calls (2-1), the document review (Task 2-2), the scoping document (Task 2-3), the final logic model (Task 2-4), and the final evaluation questions (Task 2-5), the contractor shall prepare a draft evaluation methodology, which will address the purpose, audience, the refined questions that will be the focus of the evaluation. As part of the methodology, the contractor shall document the primary and secondary data sources, collection methods, and collection strategy, appropriate qualitative and quantitative tools for analyzing data, practical issues of data collection, and a clear strategy for data documentation and management needed to answer each evaluation question. The contractor shall also document any survey instruments, survey data, survey questions, and interview/ discussion guides and protocols used in support of the evaluation. This methodology shall include an approach for identifying potential interviewees. The draft evaluation methodology shall also include a proposed schedule for each of the following: (1) all information gathering under Task 3-1, including interviews; (2) the compilation, analysis and presentation of information gathered (Task 3-2) and (3) providing a report outline and the draft and final reports (Task 4-1, 4-2 and 4-3). The draft evaluation methodology shall be due 21 calendar days after the receipt of a TD from the WA COR. The final evaluation methodology will be due 7 calendar days after receipt of comments from the WA COR via TD.

2-7 **EVALUATION ASSURANCE PLAN. (COMPLETED)** The contractor shall prepare an evaluation assurance plan (EAP) that shall describe the use of primary and or secondary data sources for the evaluation report. Specifically, the EAP will describe: 1) the purpose of the evaluation, 2) the methodology used to collect data for the report, 3) how and where data for the evaluation was collected, 4) why the particular data collection method was chosen, 5) how the data will be used and by whom, 6) how the resulting evaluation report will be used and by whom and, 7) any data limitations or caveats. An example of an EAP will be provided by the COR. The contractor shall submit the EAP to the WA COR one week after the final evaluation methodology is approved. A final EAP will be delivered 3 calendar days after receipt of comments from the WA COR via TD.

## **Deliverables and Schedule Under Task 2**

2-1	Participate in conference	To be specified by the WA COR
2-2	Summary of Document Review	7 calendar days after receipt of documents
2-3	Scoping Memo	7 calendar days after receipt of TD from WA COR
2-4	Finalize Logic Model	7 calendar days after receipt of draft Logic Model from WA COR
2-5a	Draft Refined Questions	7 calendar days after final meeting with WA COR
2-5b	Final Refined Questions	7 calendar days after receipt of comments from WA COR via TD
2-6a	Draft evaluation methodology	21 calendar days after receipt of TD from WA COR
2-6b	Final evaluation methodology	7 calendar days after receipt of comments via TD from WA COR
2-7a	Evaluation Assurance Plan	7 calendar days after COR approves final evaluation methodology
2-7b	Evaluation Assurance Plan	3 calendar days after receipt of comments via TD from WA COR

**Phase 2 Includes Tasks 2 (2-7), 3 and 4**

**TASK 3: INFORMATION GATHERING AND ANALYSIS (INCOMPLETE)**  
*[Contract Scope of Work Element III, Section 1, para(s) 1, page(s) (10 -11)]*

- 3-1 INFORMATION GATHERING. **(INCOMPLETE)** The information that is needed to conduct this evaluation will come from a variety of sources including the information identified collected in Task 2-3 and included in the final methodology 2-6b. Within 7 calendar days after the WA COR approves the evaluation methodology (via TD), the contractor shall begin the data collection process specified in the approved evaluation methodology. The data collection will end in accordance with the schedule included in the evaluation methodology.
- As part of the evaluation methodology developed in Task 2-6b, a total of 25 interviews were conducted to obtain information regarding the EPP program's influence on federal green procurement for key product areas including electronics, hospitality, and the building and construction product sectors. The contractor shall conduct 20 additional interviews. Interviews shall be completed in accordance with the timeline approved in the final evaluation methodology.
  - EPA plans to conduct a survey of federal procurement staff across the federal government. However, a free cross agency database of federal procurement staff does not exist. The contractor shall purchase a commercial list of federal procurement staff that will be used to distribute the survey to over 40,000 federal procurement staff.
  - The contractor shall coordinate the survey distribution, management, analyze survey data, and respond to inquiries from survey participants and others. Since

this survey is only being distributed to federal procurement staff, the Paperwork Reduction Act requirements do not apply.

- The absence of purchasing data maintained by the federal government has necessitated that the contractor contact a limited number of manufacturers (fewer than nine) that sell select environmentally preferable building and construction products to the federal government to better understand and characterize the federal government's purchase of these products. The contractor shall conduct a "mini-market analysis" that focuses on products that were certified to environmentally preferable standards that EPP helped to develop.

- 3-2 **DISCUSSION OF DATA COMPILATION, ANALYSIS, AND PRESENTATION. (INCOMPLETE)** In accordance with the evaluation methodology schedule, the contractor shall meet via conference call with the WA COR and other Agency staff to present and discuss approaches to and preliminary results of data compilation, analysis, and presentation of the information. Prior to this call and for discussion during the call, the contractor shall provide the WA COR with a briefing memo that outlines preliminary findings for each evaluation question, overall preliminary recommendations/conclusions.

#### **Deliverables and Schedule Under Task 3**

- |      |   |   |
|------|---|---|
| 3-1  | Discuss data compilation, analysis and presentation | In accordance with Methodology Schedule approved in Task 2-6b |
| 3-2a | Discuss data compilation, analysis and presentation | In accordance with Methodology Schedule approved in Task 2-6b |
| 3-2b | Briefing memo of preliminary findings               | In accordance with Methodology Schedule approved in Task 2-6b |

#### **TASK 4: REPORTS (INCOMPLETE)**

*[Contract Scope of Work Element III, Section 1, para(s) 1, page(s) (10 -11)]*

- 4-1 **REPORT OUTLINE. (INCOMPLETE)** The contractor shall submit an annotated outline describing the contents of the draft and final report. This will serve as a roadmap for laying out the format of the report. This will be instrumental in organizing the format and flow of the document.
- 4-2 **DRAFT REPORT. (INCOMPLETE)** In accordance with the evaluation methodology schedule, the contractor shall submit a draft report containing, the compilation, analysis, and presentation of information developed and gathered during the conduct of the evaluation. Specifically, the contractor shall include information obtained or developed in support of Tasks 2-1 through 3-2. For purposes of costing, the contractor shall assume that a sequence of a draft preliminary findings memorandum and two separate draft reports will be required.
- Because of the complexity of the evaluation, the anticipated length of the report and the significant number of stakeholders involved in the review of the draft

findings, EPA anticipates the contractor will need to respond to extensive comments on the draft report. This amendment provides additional resources that will allow the contractor to develop a second draft of the report to address the anticipated comments. The contractor shall develop a second draft of the evaluation report which addresses EPA and stakeholder comments.

- 4-3 **FINAL REPORT. (INCOMPLETE)** The contractor shall provide a final report that reflects appropriate consideration of the Agency's comments on the draft report and of any comments received during the oral presentations. The WA COR will provide the contractor with a copy of the ESD's Report Style Guidelines. These guidelines shall be used to write all components of the evaluation report. In addition, the contractor shall use the ESD Report Cover provided by the WA COR when preparing the final report.
- 4-4 **EVALUATION RECOMMENDATION TAXONOMY FORM. (INCOMPLETE)** The EPA will use this form to categorize each recommendation the contractor develops for the final report. The contractor shall complete the Evaluation Recommendation Taxonomy Form by providing each recommendation for the given evaluation, its proposed evaluation recommendation category, its direct environmental impact, and any additional comments the contractor may have. The list of the evaluation recommendation categories is located on the form for reference purposes. The WA COR will provide the contractor with a copy of the Evaluation Recommendation Taxonomy Form. The contractor shall complete the taxonomy form 3 calendar days after the final report is completed.
- 4-5 **ORAL PRESENTATIONS. (INCOMPLETE)** The contractor shall be prepared to make at least one oral presentation of the information at a date, time, and location to be specified by the WA COR in a TD. The location will most likely be Washington, D.C. The contractor shall prepare appropriate briefing materials, specifically, a power point briefing for the oral presentation.
- 4-6 **FACTSHEET. (INCOMPLETE)** The contractor shall develop a fact sheet summarizing the evaluation purpose, questions, methodology, results and recommendations. The WA COR will provide the contractor with a copy of a fact sheet template 7 calendar days after completion of the Final Report.

#### **Deliverables and Schedule Under Task 4**

- |      |                              |  |
|------|------------------------------|--|
| 4-1  | Report Outline               | In accordance with the evaluation methodology schedule approved by the COR in task 2-6b. |
| 4-2  | Draft report                 | In accordance with the evaluation methodology schedule approved by the COR in task 2-6b. |
| 4-2a | 2 <sup>nd</sup> Draft report | In accordance with the evaluation methodology schedule approved by the                   |

4-3	Final report	COR in task 2-6b. 14 calendar days after receipt of comments on the draft report and oral presentations.
4-4	Evaluation Recommendation Taxonomy	3 calendar days after the final report is completed.
4-5	Oral presentation	To be scheduled by the WA COR
4-6	Fact Sheet	7 calendar days after completion of Final Report



Table 1: Summary of Deliverables and Dates		
Task	Deliverable	Due Date
<b>Task 1 Prepare Work plan</b>		
1a	Work plan	Within 15 calendar days of receipt of work assignment
1b	Revised work plan	Within 5 calendar days of receipt of comments from CO
<b>Task 2 Document Review and Design Methodology</b>		
2-1	Participate in conference calls	To be specified by the WA COR
2-2	Review of Documents/Bibliography, summary of findings	7 calendar days after receipt of documents
2-3	Scoping Memo	7 calendar days after receipt of TD
2-4	Finalize Logic Model	7 calendar days after receipt of draft Logic Model from WA COR
2-5a	Draft Refined Questions	7 calendar days after receipt of TD from WA COR
2-5b	Final Refined Questions	7 calendar days after receipt of comments from WA COR via TD
2-6a	Draft Methodology	21 calendar days after receipt of TD from WA COR
2-6b	Final Methodology	7 calendar days after receipt of comments from WA COR
2-7a	Draft Evaluation Assurance Plan	7 calendar days after WA COR approves final evaluation methodology
2-7b	Final Evaluation Assurance Plan	3 days after receipt of comments from WA COR via TD
<b>Task 3 Information Gathering and Analysis</b>		
3-1	Gather Information (Interviews, Survey, Commercial List)	In accordance with Methodology Schedule approved in Task 2-6b
3-2	Discussion of Data Compilation, Analysis and Presentation Plan	In accordance with Methodology Schedule approved in Task 2-6b
<b>Task 4 Report</b>		
4-1	Report Outline	In accordance with Methodology Schedule approved in Task 2-6b
4-2	Draft Report	In accordance with Methodology Schedule approved in Task 2-6b
4-2a	Draft Report	In accordance with Methodology Schedule approved in Task 2-6b
4-3	Final Report	14 calendar days after receipt of comments on Draft Report from WA COR
4-4	Evaluation Recommendation Taxonomy Form	3 calendar days after completion of the Final Report
4-5	Oral Presentations	To be scheduled by the WA COR
4-6	Fact Sheet	7 calendar days after completion of Final Report



United States Environmental Protection Agency  
Washington, DC 20460

## Work Assignment

Work Assignment Number

3-30

☐ Other ☐ Amendment Number:

Contract Number  
EP-W-10-002

Contract Period 11/19/2009 To 09/19/2014  
Base Option Period Number 3

Title of Work Assignment/SF Site Name  
EPP Program Evaluation

Contractor  
INDUSTRIAL ECONOMICS, INCORPORATED

Specify Section and paragraph of Contract SOW  
Element II, Section 1, para(s) 1, page(s) 10-11

Purpose: ☐ Work Assignment ☐ Work Assignment Close-Out  
☐ Work Assignment Amendment ☐ Incremental Funding  
☒ Work Plan Approval

Period of Performance

From 09/20/2012 to 04/30/2013

### Comments

The purpose of this action to Work Assignment (WA) 3-30 is to approve the contractor's work plan budget estimated dated October 24, 2012 for Option Year 3 with an estimated cost of (b)(4), fixed fee of (b)(4), for a ceiling of \$15,820.51 and 40.2 Level of effort hours for this WA.

☐ Superfund

### Accounting and Appropriations Data

☒ Non-Superfund

SFO  
(Max 2)

Note: To report additional accounting and appropriations data use EPA Form 1900-69A.

Line	DCN (Max 6)	Budget/FY (Max 4)	Appropriation Code (Max 6)	Budget Org/Code (Max 7)	Program Element (Max 9)	Object Class (Max 4)	Amount (Dollars)	(Cents)	Site/Project (Max 8)	Cost Org/Code (Max 7)
1										
2										
3										
4										
5										

### Authorized Work Assignment Ceiling

Contract Period: 11/19/2009 To 09/19/2014

Cost/Fee

LOE:

This Action:

Total:

### Work Plan / Cost Estimate Approvals

Contractor WP Dated: 10/24/2012 Cost/Fee: \$15,820.51 LOE: 40

Cumulative Approved: Cost/Fee: \$15,820.51 LOE: 40

Work Assignment Manager Name Yvonne Watson

Branch/Mail Code:

Phone Number 202-566-2239

FAX Number:

(Signature)

(Date)

Project Officer Name Cheryl R. Brown

Branch/Mail Code:

Phone Number 202-566-0940

FAX Number:

(Signature)

(Date)

Other Agency Official Name

Branch/Mail Code:

Phone Number:

FAX Number:

(Signature)

(Date)

Contracting Official Name Stefan Marcian

Branch/Mail Code:

Phone Number 202-564-1987

FAX Number:

(Signature)

(Date) 11/9/12

<b>EPA</b> United States Environmental Protection Agency Washington, DC 20460 <b>Work Assignment</b>						Work Assignment Number 3-30			
						<input type="checkbox"/> Other <input type="checkbox"/> Amendment Number:			
Contract Number EP-W-10-002		Contract Period 11/19/2009 To 09/19/2014			Title of Work Assignment/SF Site Name MPE Program Evaluation				
Base		Option Period Number 3							
Contractor INDUSTRIAL ECONOMICS, INCORPORATED				Specify Section and paragraph of Contract SOW Element 11, Section 1, para(s) 1, page(s) 10-11					
Purpose: <input type="checkbox"/> Work Assignment <input type="checkbox"/> Work Assignment Close-Out <input type="checkbox"/> Work Assignment Amendment <input type="checkbox"/> Incremental Funding <input checked="" type="checkbox"/> Work Plan Approval				Period of Performance From 09/20/2012 To 04/30/2013					
Comments: The purpose of this action under Work Assignment (WA) 3-30 is to approve the contractor's no cost level of effort (LOE) hours increase of 178.2 LOE hours, dated October 24, 2012. In addition, this action approves the contractor's work plan and budget dated October 18, 2012 for an estimated cost of (b)(4), a fixed fee of (b)(4), for a ceiling of \$55,766.89 and 398.2 LOE hours.									
<input type="checkbox"/> Superfund    Accounting and Appropriations Data <input checked="" type="checkbox"/> Non-Superfund									
SFO (Max 2) <input type="checkbox"/> Note: To report additional accounting and appropriation's data use EPA Form 1900-69A.									
Line	DCN (Max 6)	Budget/Y (Max 4)	Appropriation Code (Max 6)	Budget Org/Code (Max 7)	Program Element (Max 9)	Object Class (Max 4)	Amount (Dollars) (Cents)	Site/Project (Max 8)	Cost Org/Code (Max 7)
1									
2									
3									
4									
5									
Authorized Work Assignment Ceiling									
Contract Period:		Cost/Fee:		LOE:					
11/19/2009 To 09/19/2014									
This Action									
Total:									
Work Plan / Cost Estimate Approvals									
Contractor WP Dated:		Cost/Fee:		LOE:					
10/18/2012		\$39,946.38		420					
Cumulative Approved:		Cost/Fee:		LOE:					
		\$55,766.89		598					
Work Assignment Manager Name Yvonne Watson						Branch/Mail Code:			
_____ (Signature) _____ (Date)						Phone Number 202-566-2239			
						FAX Number:			
Project Officer Name Cheryl R. Brown						Branch/Mail Code:			
_____ (Signature) _____ (Date)						Phone Number 202-566-0940			
						FAX Number:			
Other Agency Official Name						Branch/Mail Code:			
_____ (Signature) _____ (Date)						Phone Number:			
						FAX Number:			
Contracting Official Name Stefan Martiyan						Branch/Mail Code:			
_____ (Signature) _____ (Date) 11/20/12						Phone Number 202-564-1987			
						FAX Number:			

**EPA**United States Environmental Protection Agency  
Washington, DC 20460**Work Assignment**

Work Assignment Number

330

☐ Other ☒ Amendment Number:

000032

Contract Number  
EP-W-10-002

Contract Period 11/19/2009 To 09/19/2014

Title of Work Assignment/SF Site Name

Base Option Period Number 3

RPP Program Evaluation

Contractor

INDUSTRIAL ECONOMICS, INCORPORATED

Specify Section and paragraph of Contract SOW

Element III, Section 1, para(s) 1, page(s) 10-11

Purpose:

☐

Work Assignment

☐

Work Assignment Close-Out

☒

Work Assignment Amendment

☐

Incremental Funding

☐

Work Plan Approval

Period of Performance

From 09/20/2012 to 07/31/2013

Comments:

The purpose of this amendment to Work Assignment (WA) 330 is to increase the level of effort by 500 hours and to revise Tasks 3 and 4 as provided in the attached WA Statement of Work. The contractor shall submit a revised work plan and budget estimate in accordance with the contract.

☐

Superfund

## Accounting and Appropriations Data

☒

Non Superfund

SFO

(Max 2)

☐

Note: To report additional accounting and appropriations data use EPA Form 1900-69A.

Line	ICN (Max 6)	Budget/FY (Max 4)	Appropriation Code (Max 6)	Budget Org/Code (Max 7)	Program Element (Max 9)	Object Class (Max 4)	Amount (Dollars)	(Cents)	Site/Project (Max 8)	Cost Org/Code (Max 7)
1										
2										
3										
4										
5										

## Authorized Work Assignment Ceiling

Contract Period:

Cost/Fee:

LOE:

11/19/2009 To 09/19/2014

This Action:

Total:

## Work Plan / Cost Estimate Approvals

Contractor WP Dated:

Cost/Fee:

LOE:

Cumulative Approved:

Cost/Fee:

LOE:

Work Assignment Manager Name Yvonne Watson

Branch/Mail Code:

Phone Number 202-566 2239

FAX Number:

(Signature)

(Date)

Project Officer Name Cheryl R. Brown

Branch/Mail Code:

Phone Number 202-566-0940

FAX Number:

(Signature)

(Date)

Other Agency Official Name

Branch/Mail Code:

Phone Number:

FAX Number:

(Signature)

(Date)

Contracting Official Name Stefan Marliyan

Branch/Mail Code:

Phone Number 202-566 1987

FAX Number:

(Signature)

(Date) 1/18/13

## **Work Assignment Statement of Work - AMENDED**

**Title:** Environmentally Preferable Purchasing (EPP) Program: Evaluating the Effectiveness of Promoting Green Purchasing by Federal Agencies

**Contractor:** IEc, Inc. **Contract No.:** EP-W-10-002

**Work Assignment Number:** 3-30

**Estimated Period of Performance:** September 20, 2012 to July 31, 2013

**Amended Level of Effort:** 500 hours

### **Key EPA Personnel:**

#### **Work Assignment COR (WA COR):**

Yvonne M. Watson  
OP/OSEM/ESD (MC1807T)  
202-566-2239  
202-566-2200

**Contract Level COR:** Cheryl R. Brown  
CMG/OP (1805T)  
202/566-0940  
202/566-3001 (fax)

### **BACKGROUND AND PURPOSE:**

Located within the Office of Policy (OP)'s Office of Strategic Environmental Management is the Evaluation Support Division (ESD). ESD's mission is to build the capacity of EPA staff and managers to conduct program evaluation activities throughout the Agency by providing technical support and training on program evaluation for EPA's national programs and regional offices. A crucial component in assessing the benefit of meeting goals, objectives, and sub-objectives is having measurable results.

As part of its effort to encourage the effective use of program evaluations throughout the Agency, ESD promotes program evaluation through a Program Evaluation Competition (PEC or Competition). This Competition is part of an ongoing, long-term effort to help build the capacity of headquarters and regional offices to evaluate activities and to improve measures of program performance. This program evaluation project was chosen for support under the current Program Evaluation Competition sponsored by OP.

Federal government procurement accounts for over \$500 billion annually. In addition, the government functions as a market leader, broadly affecting manufacturing (product planning and development), and purchasing (large institutions and States that mimic federal specifications). The impact of government purchases is also recognized as an important stimulus to international green product initiatives mentioned in the U.N.'s "Green Economy" and OECD's

“Green Growth” strategies. The EPP Program was established in 1993 by Executive Order 12873, *Federal Acquisition, Recycling and Waste Prevention*, and has been reaffirmed and expanded by subsequent Executive Orders. The program’s objectives are to: (a) achieve dramatic reductions in the environmental footprint of federal purchasing through creation of guidelines, tools, recognition programs, environmental standards and other incentives and requirements, and (b) make the overall consumer marketplace more sustainable through federal leadership. It is a high-priority program in OPPT, involving several divisions, and is the largest single budget item in the Pollution Prevention Division's 2011 program allocation.

A 2001 study, *Qualitative Measurement of Environmentally Preferable Purchasing (EPP) Among Federal Employees in 2000*, provided an initial evaluation of EPP, and found only limited awareness of green purchasing options in federal procurement. OCSPP suspects there have been substantial improvements in overall awareness in the past decade as a result of maturing EPP programs, strengthened requirements, continued outreach, and the dissemination of standards, tools and guidance. The evaluation will assess the improvements that have occurred in the program since the 2001 study referenced above and identify and document the cost savings and reduced environmental footprint that can come from EPP purchases. The evaluation will use multiple, robust methodologies to gain evidence of effectiveness and produce results of strategic significance to OCSPP, EPA, and the federal government overall. The results will inform future management decisions about the program’s direction, strategies, and funding levels, as well as the Agency’s initiative on sustainable products and federal green purchasing approaches generally. This larger scale program evaluation is supported by the Office of Management and Budget’s (OMB’s) Evaluation Initiative.

### **Quality Assurance (QA) Requirements**

Check ☐ Yes or ☒ **NO**, if the following statement is true or false. The Contractor shall submit a written Quality Assurance Project Plan for any project that is developing environmental measurements or a Quality Assurance Supplement to the Quality Management Plan for any project which generates environmental data using models with their technical proposal.

### **TASKS AND DELIVERABLES:**

The work assignment (WA) Contracting Officer Representative (COR) will review all deliverables in draft form and provide revisions and/or comments to the contractor. The contractor shall prepare the final deliverables incorporating the WA COR's comments.

Contractor personnel shall at all times identify themselves as Contractor employees and shall not present themselves as EPA employees. Furthermore, they shall not represent the views of the U.S. Government, EPA, or its employees. In addition, the Contractor shall not engage in inherently governmental activities, including but not limited to actual determination of EPA policy and preparation of documents on EPA letterhead.

### **AMENDMENT PURPOSE**

The EPP survey was distributed to 145,000 recipients instead of the 40,000 that was initially planned. The purpose of this amendment is to provide additional resources to enable the

contractor to: 1) manage additional survey data via an MS Access database, respond to survey inquiries; and 2) conduct additional in depth analyses of survey results.

**The contractor shall not duplicate work performed in the previous work assignment.**

**Phase 1 Includes Task 1 and Tasks 2 (2-1 to 2-6).**

**TASK 1: PREPARE WORKPLAN – (COMPLETED)**

The contractor shall prepare a workplan that addresses Phase 1 and 2 within 15 calendar days of receipt of a work assignment signed by the Contracting Officer (CO). The workplan shall outline, describe and include the technical approach, resources, timeline and due dates for deliverables, a detailed cost estimate by task and a staffing plan. The WA COR and the Contract Level COR and the CO will review the workplan. However, only the CO can approve/disapprove the workplan. The contractor shall prepare a revised workplan incorporating the Contracting Officer's comments, if required.

**Deliverables and Schedule Under Task 1**

- |                      |   |
|----------------------|---|
| 1a. Workplan         | Within 15 calendar days of receipt of work assignment.                  |
| 1b. Revised workplan | Within 5 calendar days of receipt of comments from the CO, if required. |

**NOTE REGARDING WORK ASSIGNMENT DELIVERABLES AND TECHNICAL DIRECTION:**

The Work Assignment Contracting Officer's Representative (COR) is authorized to issue technical direction (TD) under this work assignment. The COR will follow-up all oral technical direction in writing within 5 days.

**TASK 2: DOCUMENT REVIEW AND DESIGN METHODOLOGY (INCOMPLETE)**

*[Contract Scope of Work Element III, Section 1, para(s) 1, page(s) (10 -11)]*

- 2-1 PARTICIPATE IN CONFERENCE CALLS. **(INCOMPLETE)** The contractor shall participate in conference calls with the WA COR and other Agency staff to clarify the purpose of the evaluation effort and to exchange ideas about the design of the assessment, the information to be collected, potential sources of information, appropriate ways to analyze and present the information, and other pertinent matters. The COR will contact the contractor and provide a time and date for the conference calls.
- 2-2 REVIEW DOCUMENTS. **(COMPLETED)** The WA COR will provide the contractor with relevant links and essential documents to become familiar with the history, goals, and status of each program activity to be evaluated. In addition, the contractor shall conduct a literature review to determine if any existing evaluations, studies or analysis of the program have been conducted. The contractor is expected to seek out other documents for review, including those from government and non-government sources, to become familiar with all aspects of the program that are relevant to this evaluation effort. The contractor shall complete a review of these documents seven (7) calendar days after

receiving them. The contractor shall also prepare and submit to the WA COR a bibliography and summary of the findings from the document and literature review. The contractor shall revise and update the bibliography periodically as additional literature sources are identified and reviewed.

- 2-3 **SCOPING TASK. (COMPLETED)** The contractor shall conduct a scoping exercise to better understand and identify the data sources (qualitative and/or quantitative) and data collection methods (surveys, in-person interviews, site visits, data base review or literature review, Internet search, review of progress reports etc.) that are most appropriate for this evaluation. The contractor shall prepare a brief memo summarizing the results of this effort. The contractor shall deliver the scoping document 7 calendar days after receiving a TD from the WA COR.
- 2-4 **ASSIST IN DEVELOPING A LOGIC MODEL. (COMPLETED)** The development of a logic model is an essential tool in developing a common understanding of a program's inputs, outputs and activities. As an initial step in preparation for the evaluation, EPA began developing a logic model of its program. EPA will share the draft logic model with the contractor. Based on information gathered from the conference calls (Task 2-1) and document review (Task 2-2), the contractor will develop and submit a draft logic model using software (e.g., Microsoft Word, Power Point) that can be manipulated/revised by EPA within 7 calendar days after receipt of the draft logic model from the WA COR. The development of the logic model is an iterative process. The contractor shall finalize the logic model within 7 calendar days after receipt of comments on draft(s) of the logic model from the WA COR.
- 2-5 **REFINE EVALUATION QUESTIONS. (COMPLETED)** EPA is providing an initial list of draft evaluation questions for use by the contractor (see below). The EPA evaluation team has identified the following key questions to provide focus to the program evaluation. These questions, while subject to further refinement, will form the basis of the evaluation going forward. The overarching questions would likely remain consistent, but the specific questions and sub-questions would be subject to revision. Using this list, the information gathered in Tasks 2-1 and 2-2, and the logic model developed in Task 2-4, the contractor shall confer with the WA COR and evaluation team members to discuss and refine the evaluation questions that will be the subject of this evaluation. The contractor shall prepare and submit to the WA COR a revised, comprehensive set of draft evaluations and sub-questions that will be the subject of this evaluation. The contractor shall finalize the draft questions 7 calendar days after receipt of comments from the WA COR via Technical Direction (TD).

#### **Questions to be Addressed:**

- (1) What changes have occurred at federal agencies since the 2001 evaluation -- in terms of agency awareness, criteria and decision tools -- in implementing environmentally preferable purchasing as a result of our EPP Program? What have been the quantitative impacts of these changes in terms of types of products purchased?
- (2) How much has EPP contributed to the Agency's Strategic Plan goals for cost savings as well as reductions in hazardous materials, greenhouse emissions and water use?



- (3) To what extent has our EPP Program been effective at promoting the design, manufacture and use of environmentally preferable products for federal purchasing? What has been the trend in recent years for the percentage of products in conformance with standards, such as IEEE green electronic products and green carpet standards, which the EPP Program has spearheaded the development of?
- (4) How effective have EPP tools (i.e., the EPP database, the Federal Green Construction Guide, and various calculator tools) been to assist federal purchasers in buying green? To what extent does the literature indicate that EPP tools have impacted purchasing decisions outside the federal government?
- (5) What changes may be needed to address current EPP problems and issues, such as an apparent decline in energy savings as reported by federal agencies participating in the *Federal Electronics Challenge* -- a key EPP priority area?

2-6 **DESIGN EVALUATION METHODOLOGY. (COMPLETED)** Based on the conference calls (2-1), the document review (Task 2-2), the scoping document (Task 2-3), the final logic model (Task 2-4), and the final evaluation questions (Task 2-5), the contractor shall prepare a draft evaluation methodology, which will address the purpose, audience, the refined questions that will be the focus of the evaluation. As part of the methodology, the contractor shall document the primary and secondary data sources, collection methods, and collection strategy, appropriate qualitative and quantitative tools for analyzing data, practical issues of data collection, and a clear strategy for data documentation and management needed to answer each evaluation question. The contractor shall also document any survey instruments, survey data, survey questions, and interview/ discussion guides and protocols used in support of the evaluation. This methodology shall include an approach for identifying potential interviewees. The draft evaluation methodology shall also include a proposed schedule for each of the following: (1) all information gathering under Task 3-1, including interviews; (2) the compilation, analysis and presentation of information gathered (Task 3-2) and (3) providing a report outline and the draft and final reports (Task 4-1, 4-2 and 4-3). The draft evaluation methodology shall be due 21 calendar days after the receipt of a TD from the WA COR. The final evaluation methodology will be due 7 calendar days after receipt of comments from the WA COR via TD.

2-7 **EVALUATION ASSURANCE PLAN. (COMPLETED)** The contractor shall prepare an evaluation assurance plan (EAP) that shall describe the use of primary and or secondary data sources for the evaluation report. Specifically, the EAP will describe: 1) the purpose of the evaluation, 2) the methodology used to collect data for the report, 3) how and where data for the evaluation was collected, 4) why the particular data collection method was chosen, 5) how the data will be used and by whom, 6) how the resulting evaluation report will be used and by whom and, 7) any data limitations or caveats. An example of an EAP will be provided by the COR. The contractor shall submit the EAP to the WA COR one week after the final evaluation methodology is approved. A final EAP will be delivered 3 calendar days after receipt of comments from the WA COR via TD.

## **Deliverables and Schedule Under Task 2**

2-1	Participate in conference	To be specified by the WA COR
2-2	Summary of Document Review	7 calendar days after receipt of documents
2-3	Scoping Memo	7 calendar days after receipt of TD from WA COR
2-4	Finalize Logic Model	7 calendar days after receipt of draft Logic Model from WA COR
2-5a	Draft Refined Questions	7 calendar days after final meeting with WA COR
2-5b	Final Refined Questions	7 calendar days after receipt of comments from WA COR via TD
2-6a	Draft evaluation methodology	21 calendar days after receipt of TD from WA COR
2-6b	Final evaluation methodology	7 calendar days after receipt of comments via TD from WA COR
2-7a	Evaluation Assurance Plan	7 calendar days after COR approves final evaluation methodology
2-7b	Evaluation Assurance Plan	3 calendar days after receipt of comments via TD from WA COR

**Phase 2 Includes Tasks 2 (2-7), 3 and 4**

**TASK 3: INFORMATION GATHERING AND ANALYSIS (INCOMPLETE)**  
*[Contract Scope of Work Element III, Section 1, para(s) 1, page(s) (10 -11)]*

- 3-1 INFORMATION GATHERING. **(INCOMPLETE)** The information that is needed to conduct this evaluation will come from a variety of sources including the information identified collected in Task 2-3 and included in the final methodology 2-6b. Within 7 calendar days after the WA COR approves the evaluation methodology (via TD), the contractor shall begin the data collection process specified in the approved evaluation methodology. The data collection will end in accordance with the schedule included in the evaluation methodology.
- As part of the evaluation methodology, EPA plans to conduct a survey of federal acquisition staff across the federal government. Initially, EPA planned to launch the EPP survey using Survey Monkey – a commercially available on-line survey tool. However, in order to maximize the reach of the survey and increase response rate, EPA now plans to use a survey tool developed by Office of Management and Budget’s Federal Acquisition Institute (FAI). EPA has made arrangements for contractor access to the FAI survey tool. The contractor shall learn how to use the FAI survey tool and shall monitor survey activity, run queries, generate customized reports, charts and graphs and use the data analytics feature to generate descriptive statistics of the survey data.
  - Initially, EPA anticipated the EPP survey would be distributed to a commercial list of 40,000 respondents. However, the use of the FAI survey tool has increased the survey distribution list to an additional 105,000 (for a total of 145,000 names). The contractor shall manage survey data and respond to inquiries associated with

the increased number of potential survey respondents. Since this survey is only being distributed to federal procurement staff, Paperwork Reduction Act requirements do not apply.

3-2 **DISCUSSION OF DATA COMPILATION, ANALYSIS, AND PRESENTATION. (INCOMPLETE)** In accordance with the evaluation methodology schedule, the contractor shall meet via conference call with the WA COR and other Agency staff to present and discuss approaches to and preliminary results of data compilation, analysis, and presentation of the information. Prior to this call and for discussion during the call, the contractor shall provide the WA COR with a briefing memo that outlines preliminary findings for each evaluation question, overall preliminary recommendations/conclusions.

- The contractor shall develop an Access database to house the survey data collected in Task 3-1. The database will allow EPA to view the survey data and conduct queries by agency and product category. The final database will exclude identifying information of survey respondents. The WA COR will provide a TD to specify the data elements and functions needed for the Access Database.
- The contractor shall conduct additional analyses using the survey data collected in Task 3-1. These analyses may include but are not limited to in-depth analysis of purchasing trends associated with key EPP product categories. EPA shall specify the additional analyses needed via technical direction.

#### **Deliverables and Schedule Under Task 3**

3-1	Gather information presentation	In accordance with Methodology Schedule approved in Task 2-6b
3-2a	Discuss data compilation, analysis and presentation	In accordance with Methodology Schedule approved in Task 2-6b
3-2b	Briefing memo of preliminary findings	In accordance with Methodology Schedule approved in Task 2-6b
3-2c	Develop Access Database	As specified in a TD
3-2d	Conduct In-Depth Analysis	As specified in a TD

#### **TASK 4: REPORTS (INCOMPLETE)**

*[Contract Scope of Work Element III, Section 1, para(s) 1, page(s) (10 -11)]*

- 4-1 **REPORT OUTLINE. (INCOMPLETE)** The contractor shall submit an annotated outline describing the contents of the draft and final report. This will serve as a roadmap for laying out the format of the report. This will be instrumental in organizing the format and flow of the document.
- 4-2 **DRAFT REPORT. (INCOMPLETE)** In accordance with the evaluation methodology schedule, the contractor shall submit a draft report containing, the compilation, analysis, and presentation of information developed and gathered during the conduct of the evaluation. Specifically, the contractor shall include information obtained or developed in support of Tasks 2-1 through 3-2. For purposes of costing, the contractor shall assume

that a sequence of a draft preliminary findings memorandum and two separate draft reports will be required.

- 4-3 **FINAL REPORT. (INCOMPLETE)** The contractor shall provide a final report that reflects appropriate consideration of the Agency's comments on the draft report and of any comments received during the oral presentations. The WA COR will provide the contractor with a copy of the ESD's Report Style Guidelines. These guidelines shall be used to write all components of the evaluation report. In addition, the contractor shall use the ESD Report Cover provided by the WA COR when preparing the final report.
- 4-4 **EVALUATION RECOMMENDATION TAXONOMY FORM. (INCOMPLETE)** The EPA will use this form to categorize each recommendation the contractor develops for the final report. The contractor shall complete the Evaluation Recommendation Taxonomy Form by providing each recommendation for the given evaluation, its proposed evaluation recommendation category, its direct environmental impact, and any additional comments the contractor may have. The list of the evaluation recommendation categories is located on the form for reference purposes. The WA COR will provide the contractor with a copy of the Evaluation Recommendation Taxonomy Form. The contractor shall complete the taxonomy form 3 calendar days after the final report is completed.
- 4-5 **ORAL PRESENTATIONS. (INCOMPLETE)** The contractor shall be prepared to make at least one oral presentation of the information at a date, time, and location to be specified by the WA COR in a TD. The location will most likely be Washington, D.C. The contractor shall prepare appropriate briefing materials, specifically, a power point briefing for the oral presentation.
- The contractor shall make two additional oral presentations in Washington, D.C. One presentation shall be in-person; the second presentation shall be conducted using virtual conferencing technology (e.g. WebEx or Goto Meeting). The WA COR will specify the time and location of the briefings in a TD.
- 4-6 **FACTSHEET. (INCOMPLETE)** The contractor shall develop a fact sheet summarizing the evaluation purpose, questions, methodology, results and recommendations. The WA COR will provide the contractor with a copy of a fact sheet template 7 calendar days after completion of the Final Report.

#### **Deliverables and Schedule Under Task 4**

- |     |                |  |
|-----|----------------|--|
| 4-1 | Report Outline | In accordance with the evaluation methodology schedule approved by the COR in task 2-6b. |
| 4-2 | Draft report   | In accordance with the evaluation methodology schedule approved by the COR in task 2-6b. |

4-2a	2 <sup>nd</sup> Draft report	In accordance with the evaluation methodology schedule approved by the COR in task 2-6b.
4-3	Final report	14 calendar days after receipt of comments on the draft report and oral presentations.
4-4	Evaluation Recommendation Taxonomy	3 calendar days after the final report is completed.
4-5	Oral presentation	To be scheduled by the WA COR
4-6	Fact Sheet	7 calendar days after completion of Final Report

## Table 1: Summary of Deliverables and Dates

Task	Deliverable	Due Date
<b>Task 1 Prepare Work plan</b>		
1a	Work plan	Within 15 calendar days of receipt of work assignment
1b	Revised work plan	Within 5 calendar days of receipt of comments from CO
<b>Task 2 Document Review and Design Methodology</b>		
2-1	Participate in conference calls	To be specified by the WA COR
2-2	Review of Documents/Bibliography, summary of findings	7 calendar days after receipt of documents
2-3	Scoping Memo	7 calendar days after receipt of TD
2-4	Finalize Logic Model	7 calendar days after receipt of draft Logic Model from WA COR
2-5a	Draft Refined Questions	7 calendar days after receipt of TD from WA COR
2-5b	Final Refined Questions	7 calendar days after receipt of comments from WA COR via TD
2-6a	Draft Methodology	21 calendar days after receipt of TD from WA COR
2-6b	Final Methodology	7 calendar days after receipt of comments from WA COR
2-7a	Draft Evaluation Assurance Plan	7 calendar days after WA COR approves final evaluation methodology
2-7b	Final Evaluation Assurance Plan	3 days after receipt of comments from WA COR via TD
<b>Task 3 Information Gathering and Analysis</b>		
3-1	Gather Information (Interviews, Survey, Commercial List)	In accordance with Methodology Schedule approved in Task 2-6b
3-2a	Discussion of Data Compilation, Analysis and Presentation Plan	In accordance with Methodology Schedule approved in Task 2-6b
3-2b	Briefing memo of preliminary findings	In accordance with Methodology Schedule approved in Task 2-6b
3-2c	Develop Access Database	As specified in TD
3-2d	Conduct In-depth Analysis	As specified in TD
<b>Task 4 Report</b>		
4-1	Report Outline	In accordance with Methodology Schedule approved in Task 2-6b
4-2	Draft Report	In accordance with Methodology Schedule approved in Task 2-6b
4-2a	Draft Report	In accordance with Methodology Schedule approved in Task 2-6b
4-3	Final Report	14 calendar days after receipt of comments on Draft Report from WA COR
4-4	Evaluation Recommendation Taxonomy Form	3 calendar days after completion of the Final Report
4-5	Oral Presentations	To be scheduled by the WA COR
4-6	Fact Sheet	7 calendar days after completion of Final Report





United

Environmental Protection Agency  
Washington, DC 20460

Work Assign

Number

## Work Assignment

3-30

☐ Original ☐ Amendment Number:Contract Number  
EP-W-10-002

Contract Period

☐ Base ☒ Option Period Number: 3

Title of Work Assignment

EPP Program Evaluation

Contractor

INDUSTRIAL ECONOMICS, INCORPORATED

Specify Section and Paragraph of Contract SOW

Element II, Section 1, para(s) 1, page(s) 10-11

Purpose:

- ☐ Work Assignment Initiation ☐ Work Assignment Close-Out  
☐ Work Assignment Amendment ☐ Incremental Funding  
☒ Work Plan Approval

Periods of Performance

From: 09/20/2012 To: 07/31/2013

Comments:

The purpose of this under Work Assignment 3-30 is to approve the contractor's work plan budget estimate dated February 4, 2013 with an incremental increase in the estimated cost of (b)(4) in fixed fee, for a total approved incremental increase of \$547,496.70, and an increase in level of effort equaling 500 hours.

☐ Superfund

## Accounting and Appropriations Data

☒ Non-Superfund

Line	DC (Max 6)	Budget/FYs (Max 4)	Appropriation Code (Max 6)	Budget Org/Code (Max 7)	Program Element (Max 9)	Object Class (Max 4)	Amount	(Dollars)	(Cents)	Site/Project (Max 8)	Cost Org/Code (Max 7)
1											
2											
3											
4											
5											

## Authorized Work Assignment Ceiling

Contract Period:

Cost/Fee

LOE

11/19/2009 to 09/19/2014

This Action

Total

## Work Plan / Cost Estimate Approvals

Contractor WP Dated: 02/04/2013

Cost/Fee: \$47,496.70

LOE: 500

Cumulative Approved:

Cost/Fee: \$103,263.59

LOE: 1,098

Work Assignment Manager Name

Yvonne Watson

Branch/Mail Code

Phone Number 202 566 2239

Fax Number

(Signature)

(Date)

Project Officer Name

Cheryl R. Brown

Branch/Mail Code

Phone Number 202-566-0940

Fax Number

(Signature)

(Date)

Other Agency Official Name

Branch/Mail Code

Phone Number

Fax Number

(Signature)

(Date)

Contracting Officer Name

Stefan Mariyan

Branch/Mail Code

Phone Number 202-564-1987

Fax Number

(Signature)

(Date)

Contractor Acknowledgement of Receipt and Approval of Workplan (Signature and Title)

Date